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# World Production and Trade

United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

Washington, D.C. 20250

Weekly  
Roundup

WR 16-85

April 17, 1985

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

## GRAIN AND FEED

KOREA has bought the last of Australia's 1984 weather-damaged feed wheat, bringing purchases to about 850,000 tons for 1984/85. With strong feed grain consumption expected again in 1985/86, demand for U.S. corn could be restored to more historical levels. U.S. corn shipments to Korea, which had averaged 3.2 million tons the previous three years, have fallen to only about 500,000 tons thus far in 1984/85 (October-September), displaced by Australian feed wheat and Chinese corn.

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U.S. wheat export commitments to ISRAEL in the current wheat marketing year (June-May) are approaching 600,000 tons, about 40 percent above the previous year. For the second year in a row, Israel is experiencing a drought-reduced wheat crop. As a result, wheat import requirements in the coming year will be higher than anticipated, and U.S. wheat exports to Israel could be near record levels.

## OILSEEDS AND PRODUCTS

MALAYSIA is expected to continue to expand its share of the INDIAN vegetable oil market in 1985, according to the U.S. agricultural attache in Kuala Lumpur. Malaysian palm oil has made significant inroads into Indian vegetable oil imports in the past five years. Palm oil is now expected to account for almost half of total Indian vegetable oil imports in 1984/85, compared with less than one third in 1980/81.

A similar situation is developing in PAKISTAN. In 1984, Malaysian palm oil exports to India and Pakistan were 597,000 and 199,000 tons, respectively. While in 1984, U.S. soybean oil exports to India and Pakistan were 196,866 and 226,800 tons, respectively.

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## DAIRY, LIVESTOCK AND POULTRY

Recently released data from the Jan. 15, 1985, YUGOSLAVIAN livestock census shows a sharp drop in livestock numbers, according to the U.S. agricultural counselor in Belgrade. Cattle numbers were down 2.8 percent to 5.2 million head while hog numbers were down 7 percent to 8.7 million. Even poultry numbers were down 4.4 percent, the first decline in 20 years. The decline in Yugoslavian livestock numbers was attributed to uncertain feed supplies and high feed prices in 1984, a weak domestic market and poor export prospects due largely to European Community (EC) meat surpluses.

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The EUROPEAN COMMUNITY COMMISSION has reduced the export subsidies for canned hams and shoulders and fresh, chilled or frozen pork to the United States and Canada for the second time this year. The subsidy for hams is now the equivalent of \$110 per ton, down from the previous level of \$255. The new subsidy for shoulders is \$103 per ton, compared with the previous level of \$235. The new subsidies for fresh, chilled or frozen pork are about \$97-\$110 per ton, down from the previous level of \$193-\$207. As was the case for the last change, the reason cited for this reduction was again the continued firming of U.S. prices and the strength of the U.S. dollar.

The value of EC exports of fresh, chilled or frozen pork, canned hams and shoulders to the United States was \$337 million in 1984, up from \$239 million in 1983. Through February 1985, the value of U.S. imports of these products totaled \$67 million, up from \$39 million during January-February 1984. Due to the strength of the dollar and the fact that Denmark was recognized as being free of foot and mouth disease in January 1984, the quantity of these imports from the EC in 1984 were much greater, reaching more than 130,000 tons, compared with 60,000 tons in 1982 and 72,500 tons in 1983.

The decrease in the export restitution for the United States and Canada also was due to the awareness by the Commission that it was spending more than necessary to sell pork in North America. Additionally, the Canadian government informed the Commission that the previous subsidies were causing a huge influx of EC pork into Canada, and strongly requested that the EC lower the subsidy.

## COTTON AND FIBERS

ARGENTINA's 1984/85 cotton crop is estimated at 827,000 bales, slightly above last year's revised crop of 822,000 bales, according to the U.S. agricultural counselor in Buenos Aires. Increased output is attributed to expanded use of higher yielding, shorter growing varieties and favorable weather during the growing season. The crop is currently being harvested and as a result of favorable weather conditions, cotton quality is reportedly very good.

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YUGOSLAVIA's imports of cotton have grown steadily over the past several years, reaching a record 583,000 bales in 1984. In 1985, imports of cotton are expected to exceed 600,000 bales, making Yugoslavia the second largest importer of cotton in Eastern Europe. Moreover, U.S. cotton has been gaining a larger portion of this East European market, accounting for nearly 25 percent in 1984. This share may increase even further in 1985 given the Soviet Union's reduced export potential. U.S. shipments from August 1 to April 4 were more than 20 percent above the same period last year.

#### TOBACCO

WEST GERMANY's leaf tobacco consumption in 1984 is estimated to have remained at the 1982 and 1983 level of about 135,000 tons. The use of U.S. tobacco dropped by about 1,000 tons (down 3.3 percent) because of comparatively high U.S. prices. U.S. flue-cured shipments to West Germany were up 13 percent in 1984, while burley shipments dropped 9 percent. The confusion on the German cigarette market caused by the steep tax increase of 1982 has disappeared. Price is no longer being used as an aggressive marketing instrument as in 1983. Traditional cigarette brands are regaining market shares, which had been lost to generics.

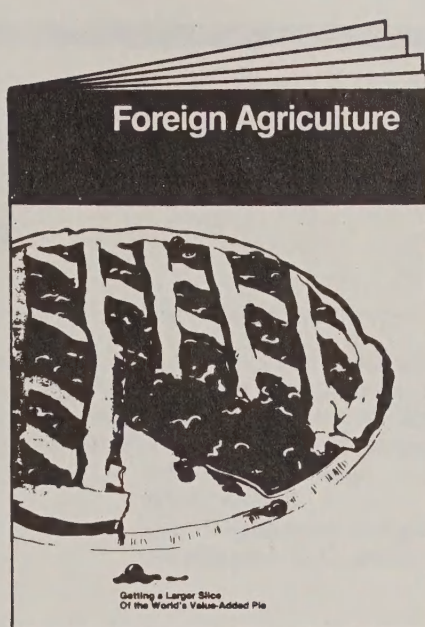
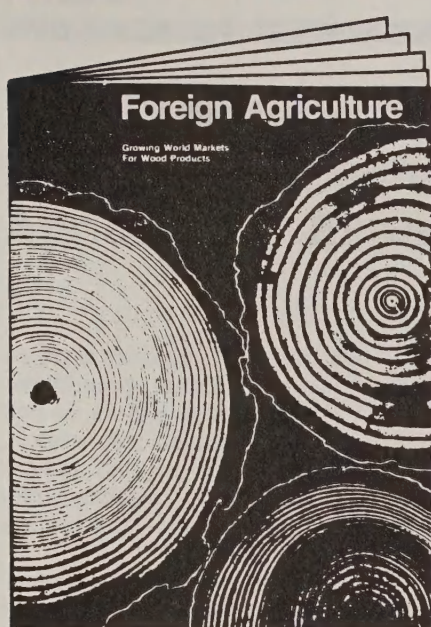
#### SEEDS

Exports of U.S. seeds for planting totaled \$251 million during July 1984-February 1985, up 6 percent from a year earlier. Volume totaled 191,000 tons, an increase of 13 percent above last year. The value of forage seeds exported totaled \$45 million, vegetable seeds \$97 million, corn seed \$48 million and sorghum seed \$20 million for the eight-month period. Major markets for U.S. seed exports were the European Community \$76 million, Mexico \$37 million and Japan \$34 million.

Selected International Prices

Item	: April 16, 1985	: Change from	: A year
	:	: previous week	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			
Canadian No. 1 CWRS-13.5%.	187.00	5.09	+4.00
U.S. No. 2 DNS/NS: 14%....	171.25	4.66	-.75
U.S. No. 2 S.R.W. ....	168.50	4.59	-1.50
U.S. No. 3 H.A.D.....	181.00	4.93	0
Canadian No. 1 A: Durum...	189.75	5.16	0
Feed grains:			
U.S. No. 3 Yellow Corn....	136.00	3.45	0
Soybeans and meal:			
U.S. No. 2 Yellow.....	241.75	6.58	-4.25
Brazil 47/48% SoyaPellets 4/	153.00	--	+2.00
U.S. 44% Soybean Meal....	154.00	--	+4.00
U.S. FARM PRICES 3/			
Wheat.....	124.18	3.38	-1.47
Barley.....	85.89	1.87	0
Corn.....	105.12	2.67	0
Sorghum.....	97.00	4.40 2/	0
Broilers 4/.....	1106.93	--	+45.41
EC IMPORT LEVIES			
Wheat 5/.....	65.20	1.77	+5.00
Barley.....	62.60	1.36	+4.95
Corn.....	57.30	1.46	+4.90
Sorghum.....	70.20	1.78	+.65
Broilers 4/ 6/ 8/.....	163.00	--	N.Q.
EC INTERVENTION PRICES 7/			
Common wheat(feed quality)	152.40	4.15	+6.55
Bread wheat (min. quality)7/	162.00	4.41	+6.95
Barley and all			
other feed grains.....	152.40	--	+6.55
Broilers 4/ 6/.....	980.00	--	N.Q.
EC EXPORT RESTITUTIONS (subsidies)			
Wheat .....	25.95	.70	--
Barley.....	39.65	.86	--
Broilers 4/ 6/ 8/.....	96.00	--	N.Q.

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Twelve-city average, wholesale weighted average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. N.A.=None authorized. N.Q.=Not quoted. Note: Basis May delivery.



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